DBPR Status Report Dashboard

Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

RW Task Timeliness

RW Task Completeness

Direct Impact Task Timeliness

Other Task Timeliness

Direct Impact Task Completeness

Other Task Completeness

Direct Impact Task Timeliness:

Score = 96.9%

- Submitted On Time = 36
- Submitted Late = 6
- Pending Submission = 1

Other Task Timeliness:

Score = 93.82%

- Submitted On Time = 62
- Submitted Late = 13
- Pending Submission = 0

Direct Task Completeness:

Score = 91.90%

- Submitted Complete = 37
- Submitted Incomplete = 3
- Completed After Submission = 2

Other Task Completeness:

Score = 100.00%

- Submitted Complete = 47
- Submitted Incomplete = 0
- Completed After Submission = 0

The RW Task Timeliness dials reflect the timeliness of your agency's submission of all RW tasks based on the task due date. Calculations are based on all RW tasks to date.

The RW Task Completeness dials reflect the completeness of your agency's task submissions based on the task rubric. Calculations of task completeness includes all RW Tasks since RW 512.

The Change Champion Network composition reflects the completeness of your CCN makeup.

Change Champion Network:

- Unique Filled Role = 9
- Duplicate Filled Role = 6
- Vacant Role = 1

The dials above include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

RW Tasks - Completed or Open Items

Project Impact	Critical Operational Element	Task ID	Task Name	Task Planned Start Date	Task Planned End Date	Agency Reported Task Progress	Agency Submission Date	Status Comment	Project Verification of Completion	Agency Corrected Submission Date
Direct	Technology	576	Complete Internal Agency Business System Test and Remediation to prepare for Cycle 2 - Technical Interface Testing	01/06/25	07/25/25	50% - In Progress		DBPR will be testing 1 interface - API002 out of Versa Regulation; remediation not yet complete; we will be ready to test by 10/1/25.		
Indirect	Processes	574	Prepare Documentation for User Acceptance Testing	06/02/25	10/17/25	50% - In Progress				
N/A	People	610	Update Authorized Smartsheet Users	06/23/25	07/11/25	100% - Submitted	07/15/25		N/A	
Direct	Technology	591	Confirm IDP Configuration for Florida PALM	06/23/25	07/11/25	100% - Submitted	07/15/25		Submission Complete	
Indirect	N/A	593	Update Agency Readiness Certification #1	06/23/25	07/18/25	100% - Submitted	07/18/25		Submission Complete	
N/A	N/A	611	Submit Bimonthly Agency Readiness Status Report	07/01/25	07/10/25	100% - Submitted	07/08/25		Submission Complete	
N/A	People	616	Share Florida PALM Updates	07/14/25	07/25/25	100% - Submitted	07/25/25	Communications did not slow down from April-June; however, due to departure of both PM (planned) and OCM (unexpected) leads, year-end activities, and some staffing changes, only the minimum required examples have been added to Smartsheet.	Submission Complete	
Direct	People	573-B	Complete and Submit End User Role Mapping Worksheet for remaining End Users.	07/14/25	10/17/25	50% - In Progress		Role mappings are being reviewed for roles missing assignments and updates needed from Project Recommended Activities that were missing. This task will be completed by 10/03/2025..		
Indirect	N/A	660	Submit Monthly Progress Report - Testing	08/04/25	08/29/25	100% - Submitted	08/29/25	The first interface file is expected by close of business today for internal review.	Submission Complete	
Direct	Data	587-A	Complete Data Cleansing Based on Mock Conversion 3	08/11/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering		Mock 3 errors were reviewed yesterday. More work will be done in the next 2 weeks to correct FLAIR and MFMP errors.		
Direct	Data	587-B	Complete Data Cleansing Based on Mock Conversion 3 – APC001 Suppliers	08/11/25	10/17/25	50% - In Progress		Preparations are in progress to adopt ACH functionality.		
Direct	Data	661	Update Conversion Field Mapping	08/11/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
Direct	Data	662	Submit Updated Configuration Workbooks	08/11/25	10/17/25	25% - Beginning Initial Internal Meetings and Information Gathering				
N/A	N/A	617	Submit Bimonthly Agency Readiness Status Report	08/29/25	09/10/25	100% - Submitted	09/10/25		Submission Incomplete	
Indirect	N/A	664	Submit Monthly Progress Report - Testing	09/02/25	09/30/25	25% - Beginning Initial Internal Meetings and Information Gathering				

Agency Reported

The Risks, Issues, and Assumptions tables below display only items that were marked confirmed and were opened/logged, closed/resolved or active during the reporting period.

DBPR Risks

Status	Date Opened	Date Closed	Risk Category	Risk Title	Trend	Risk Rating	Background	Monitor/Mitigation Plan/Resolution	Impact if Risk Becomes an Issue	Reporting Period Comments for July - August 2025
Open and Mitigating	01/13/25		Staffing/Resource Availability	If significant problems are encountered during UAT when testing Versa Regulation output files (spreadsheet uploads and interfaces), there may not be enough time for DBPR IT to make modifications in time to be retested	Stable	9 (High/High)	DBPR IT has many simultaneous projects on their plates and they are trying to prioritize to get the PALM project what is needed when it is needed.	Conduct structured walkthroughs, desk-checks, and as much unit testing as possible prior to UAT	There may not be enough time for DBPR IT to make modifications in time to be retested	DBPR-IT is now working on the Versa interface. Updates will be added soon.
Open and Mitigating	06/30/25	07/24/25	Staffing/Resource Availability	If our busiess analyst is not onboarded and ready to go by the start of UAT Online, then he/she may miss an opportunity to understand navigation necessary to throughly complete test scripts	Increasing	6 (Medium/High)	The BA is needed to write test cases for UAT	Hire and onboard the business analyst prior to August 2025 or find other resources who can assist..	Delays will be encountered in creating and completing test cases in time for UAT in August.	Hiring a BA is not possible. The new OCM Manager will take on this task.
Open and Mitigating	03/27/25		Deployment/Cutover	If the deployment PALM occurs on 7/1/2026 as is now planned, working on bugs and other remedies as well as transition activities could interfere with Year End activities.	Increasing	6 (High/Medium)	Year End is a very hectic time of the year for DBPR Finance & Accounting.	Discuss with readiness coordinators and arrive at logistics that least impact Year End efforts	Working on bugs and other remedies as well as transition activities could interfere with Year End activities	Florida PALM confirmed this is an issue across multiple agencies and it being taken into consideration.
Open and Mitigating	04/23/25		Business Process Change	If PALM (The Project) does not take into account Statutory requirements surrounding Financial Statement preparation and completion into their decision making (particularly Year end activities in 2026 around deployment time), then violations of statutes from a timing perspective may result	Increasing	6 (High/Medium)	This was discussed with IV&V at our monthly IV&V meeting	Share Risk with RC Team and ensure this is presented to the PALM Project decision-makers so Statutes can be incorporated into planning and subsequent Decisions that impact the Agencies.	The PALM Project could be out of compliance with state statute(s).	This will be addressed after UAT has completed to determine if processes were updated to take into account this risk.
Open and Monitoring	06/11/25		Conversion/Configuration	If Mock 3 conversion data is not full cleansed and converted from FLAIR to PALM, then DBPR could have incomplete and/or inaccurate data in the UAT environment and that could negatively impact UAT testing	Decreasing	6 (High/Medium)	This Risk relates to PALM Tasks 571, 657, and 659 that are substantial and impactful. The due dates are aggressive.	Work closely with SMEs and data experts and closely monitor and manage PALM Tasks 571, 657/657-A, and 659.	Incomplete or inaccurate data for the UAT Online sessions.	Mock 3 cleanup is in progress as part of Mock 4.
Open and Mitigating	02/19/25		Business Process Change	If all business processes (Current-State and Future-State) are not reviewed before UAT begins, DBPR SMEs will have minimal time to catch up	Increasing	4 (Medium/Medium)	Subject Matter experts need to review all workflows (present and future) to ensure the business functions are documented properly because this documentation serves as the foundation for many other PALM Project activities.	Make every attempt to schedule and conduct business process review sessions (Crosswalks) before UAT begins. UAT currently scheduled to begin in August 2025.	DBPR SMEs will have minimal time to catch up review of business processes	Test Cases will be reviewed with business units to flush out any issues prior to the start of UAT
Open and Mitigating	04/09/24		Training	If DBPR process owners are not prepared from an Organizational Change perspective (training, documentation, understanding, and emotional)	Decreasing	3 (High/Low)	Requires Organizational Change Management	Analyze DBPR future Process Flows to identify new process steps, document them, and communicate with Process Owners. Create visual aids, mapping documents, and other PALM educational tools.	PALM readiness for DBPR could be negatively impacted	During walk throughs of future processes with process owners, the team is identifying areas of concern to address with training, documentation, and communications.

Status	Date	Date 2	Category	Risk Description	Trend	Rating	Description	Mitigation	Impact	Update
				and emotional), then PALM readiness could be negatively impacted						
Open and Mitigating	05/31/24		Business Process Change	If DBPR end users are not familiar with and understand PALM Future-State Processes, then translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Decreasing	3 (High/Low)	Documentation on Future-State business processes is being provided by The Project on the PALM website.	Establish and conduct PALM Education and related planning. Review Future-State processes with end users. Add Tasks to the Project Schedule and manage their completion.	Translating Current-State Business Processes will be difficult and will negatively impact DBPR PALM readiness	Meetings are being scheduled with process owners for each DBPR area so that the team can prepare materials necessary for support and to identify any issues that require more attention.
Open and Mitigating	11/15/24		Deployment/Cutover	If DBPR does not have a cutover plan for the duration when FLAIR is shutdown but PALM is not yet available, key business processes may not be able to be completely timely and could have negative consequences.	Stable	3 (High/Low)	Down time and other conditions need to be planned for to ensure a smooth transition.	Create a Cutover Plan that Identifies all planned activities and possible impacts, taking into account Florida rules and regulations, and other considerations.	Key business processes may not be able to be completely timely and could have negative consequences	This plan is on hold until after UAT and Service Now tickets are resolved
Open and Mitigating	01/13/25		User Acceptance Testing	If Future-State PALM flows are not captured at a detail enough level, it may be hard to develop detailed test scripts as well as properly prepare for UAT, which could negatively impact the timely, efficient, and successful completion of UAT	Increasing	3 (High/Low)	It is important to have detailed and comprehensive test scripts in order to conduct thorough testing and reduce the possibility of errors in production.	Ensure that crosswalks, user stories, and flow detail diagrams are covered at a detail level. Ensure sources of data required to complete business processes (e.g. FLAIR@BPR, Reports, queries, etc are identified for current processes so equivalents (when applicable can be identified before test scripts are created.	Negative impact to the timely, efficient, and successful completion of UAT	The videos with each Palm Flow help, especially when there are dropdowns with multiple options where screenshots don't help. Making progress.
Open and Mitigating	07/09/25	08/08/25	Staffing/Resource Availability	If the Organizational Change Manager is not onboarded and ready to go by the start of UAT Online, then he/she may miss an opportunity to understand navigation necessary to throughly complete test scripts	Stable	3 (High/Low)	The OCM Manager resigned unexpectedly Monday, July 7.	Interviews are scheduled for today, July 10 for a possible replacement.	Delays may be encountered in coordinating Training and in UAT testing.	The new OCM is on board. This risk is closed
Open and Mitigating	04/18/24	08/14/25	Business Process Change	If DBPR end users cannot understand Future-State Process Flow language (created by DFS PALM), then they will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete workflows	Increasing	2 (Medium/Low)	KPMG assesses all of DBPR's current business processes and that documentation is be used to transition to PALM business processes. Flow diagrams are being used.	Continue to expose the staff to Business Processes and related details and ensure they have access to all tools (UAT sandbox, flow diagrams, screen mockups from Design Workshops, FLAIR Transactions to PALM Equivalents Crosswalk, etc.)	DBPR end users will not be able to map current Process Flows, nor confirm the accuracy of the Future-State Process Flows and that could lead to incomplete workflows	Closing this as a duplicate of Risk #18
Open and Mitigating	04/23/24		Agency Business System	If PALM does not provide efficient Data Warehouse and PALM data availability tools similar to FLAIR@BPR capabilities, then DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live	Stable	2 (Medium/Low)	FLAIR@BPR has been a tool that DBPR staff have relied to run real-time custom queries to get current data necessary to complete business functions.	Review and document FLAIR@BPR data requirements and compare to PALM Chart of Accounts to identify any gaps. Identify and establish the necessary PALM data queries and store them for subsequent use. Identify constraints and limitations precipitated by batch cycles that need to run.	DBPR may not have the data (when needed) necessary to complete Future-State Business Processes once we go live with PALM	Florida Palm is currently working on DW tools similar to FLAIR@DBPR. These will be tested when available.
Open and Mitigating	08/16/24		User Acceptance Testing	If DBPR does not test all send/receive transactions for Inter/IntraUnit process model	Stable	2 (Medium/Low)	It would be better to have real transfers occur involving the actual real-life players to get more real testing	Identify an Agency that we can partner up with and coordinate send/receive testing with them	UAT testing could be inadequate and could negatively impact DBPR PALM readiness	DBPR will contact POCs before UAT

			process model, UAT testing could be inadequate and could negatively impact DBPR PALM readiness			and to reduce the likelihood of unanticipated errors.				
Open and Mitigating	08/19/24		User Acceptance Testing	If DBPR does not test email notifications from PALM as part of our UAT testing (particularly proxies and delegates), then DBPR may not have the desired flexibility once we go to production with PALM	Stable	2 (Medium/Low)	We need to not only test normal email notifications sent from PALM, but also special conditions and overrides to simulate the real world.	Be sure to create test scripts that incorporate proxies and delegates for PALM email notifications during UAT	DBPR may not have the desired email notification flexibility once we go to production with PALM	Linda confirmed with Nicole that email testing will be during Full UAT, not UAT Online.

DBPR Issues

Status	Date Opened	Date Closed	Issue Category	Issue Title	Priority	Background	Action Plan	Planned or Actual Resolution Date	Reporting Period Comments for July - August 2025
Open	06/04/25		Agency Business System	ABS Versa Regulation remediation is behind schedule	Critical - Impacts the abil	DBPR IT has not produced any output files from the remediation of Versa Regulation for PALM and development of the direct interface API002 has not even been started, which should have started in May based on the re-baselined Project Schedule.	Escalate to DBPR leadership and make sure it is prioritized highly by DBPR IT.	10/03/25	The first draft of the Versa Interface was delivered on Friday, 08/29/25 with many questions to answer regarding field mapping. Resolutions are in progress.

DBPR Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments for July - August 2025
People	The success of the Florida PALM project is one of the highest DBPR project priorities. All other financial functional projects should be scheduled appropriately.	Logged	04/01/24	All DBPR stakeholders	DBPR is committed to this project and has made resources available as needed. Unplanned resource changes have had minimal impact.
Processes	The Agency Project Schedule will be used to establish and monitor scope and progress of tasks supporting the implementation of Florida PALM.	Logged	04/01/24	All DBPR stakeholders	Project Schedule is reviewed, updated, and managed daily. Weekly snapshots in MS Project, Excel, and PDF formats is posted to the Project Repository. The Project Schedule has been re-baselined and includes all new Tasks and dates per the 6-month extension.
Processes Technology	All work required by the Florida PALM project for Agency Readiness will be documented in the Florida PALM Readiness Workplan (Smartsheet).	Logged	04/01/24	Project Manager Organizational Change Manager DBPR Sponsor	Updates are current through 09/09/2025
People	Resources will be available to support the agreed-upon schedule.	Logged	04/01/24	All DBPR division/office staff	Resources have been providing assistance as needed. More will be required of them as we finish preparations for UAT.
Processes	Based on the current Florida PALM implementation timeline, the Go-Live date for the Florida PALM solution is expected to occur no sooner than July 2026.	Logged	04/01/24	All DBPR stakeholders	Extending the Online UAT start date makes this assumption more a reality.
People Processes	There will be sufficient engagement by division/office resources knowledgeable about their organization business processes.	Logged	04/01/24	All DBPR division/office staff	DBPR staff have been engaged and responsive.
People Processes Data	Division/Offices act on the CCN/PALM Readiness information and direction.	Logged	04/01/24	All DBPR division/office staff	Project guidance and direction will continue to be provided by the DBPR Project Manager in a timely manner.
People Processes	The DBPR Functional PALM Readiness Project will be supported and managed by executive leadership in addition to the Project Manager.	Logged	04/01/24	DBPR Executive Leadership Project Manager	DBPR Leadership contiues to be engaged.
People Processes Technology Data	The Department will remediate all agency business systems (ABS) impacted by Florida PALM that cannot be retired.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	Remediation of Versa is in progress.
People Processes Technology Data	The Department will complete all necessary interface and spreadsheet upload builds to allow for business operations to continue in the Florida PALM solution.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff DBPR Disbursements staff Accounting Systems Analyst	DBPR has added a direct interface from Versa using format API002 for refunds out of Versa Regulation. Previously, an upload spreadsheet was going to be used. Versa is producing 2 other files to be imported into PALM, but those remain upload spreadsheets (ARI010 and IUI001).
Processes Technology Data	Following (and contingent upon) the successful Go Live implementation of Florida PALM and confirmation of its operational stability, FLAIR will not be available as a "fallback" option after the transition to Florida PALM. Note: A snapshot of FLAIR@BPR data query tool will be retained and available for subsequent use of historical data only.	Logged	04/01/24	All DBPR stakeholders	There will be a period of time where neither FLAIR nor PALM will be available. Details are still not know at this time.
Processes Technology Data	All FLAIR functions and sub-functions will be transitioned to Florida PALM or identified as no longer needed.	Logged	04/01/24	All DBPR stakeholders	Some processes will remain outside of PALM, some will begin outside of PALM, and some manual processes will be replaced by PALM automation.
Processes Technology Data	The Florida PALM Project will be able to provide timely and complete requirements for agency business processes with enough detail and time to implement the changes according to the Florida PALM schedule.	Logged	04/01/24	All DBPR stakeholders	Reviews of business process changes are being scheduled with impacted business units.
People Processes Technology Data	DBPR Divisions/Offices will identify and make the necessary business process changes with enough detail and time to implement the changes according to the Florida PALM Project Schedule.	Logged	04/01/24	All DBPR stakeholders	Confirmation of the changes are expected as they review test cases prior to UAT.
People Processes Technology Data	Testing of remediated agency and enterprise business systems and business processes will be rigorous and scheduled well-ahead of implementation to ensure enough time to resolve identified issues.	Logged	04/01/24	DBPR IT Project Manager Organizational Change Manager DBPR Revenue staff	One (1) direct interface from Versa to PALM (API002) is being developed. Enterprise Business Systems will be tested during Full UAT.
People Processes Technology Data	The Department will actively participate in the agency testing efforts of the new processes and validate the outputs meet the needs of the Department.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau	Agency SMEs will review test cases before attending UAT to validate their needs will be met.

Category	Assumption	Status	Date	Responsible Parties	Comments
				Finance & Accounting Bureau Chief	
People	Funding for contracted services will be released and those resources will be available to perform the work assigned to them as scheduled.	Logged	04/01/24	DBPR Sponsor Project Manager Organizational Change Manager	Consultant resources have been contracted through June 2026
People Processes	The Florida PALM Project will prepare and provide training and related training materials.	Logged	04/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Finance & Accounting Bureau Chief	Training materials are available on the PALM site and in the LMS system. UAT Training is on hold until test cases are reviewed by SMEs.
People Processes Technology Data	The Department will support data cleansing. PALM configuration and conversion tasks will facilitate this cleansing.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Data cleansing is currently in progress for Mock 3 and Mock 4.
People Processes Technology Data	The Florida PALM Project will perform data conversion.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Florida PALM is performing data conversions for Mock 4.
People Data	The Florida PALM Project will provide a Chart of Accounts crosswalk, interface layouts, and conversion layouts.	Logged	04/01/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	These are available on the PALM website under the Chart of Accounts tab.
People Processes Technology Data	DFS PALM (The Project) will maintain the Requirements Traceability Matrix (RTM) as well as recording the traceability details for all Business requirements	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Data	DBPR will identify any unique Business requirements resulting from review of the Future-State processes and will maintain these requirements in the DBPR PALM Readiness RTM as well as related traceability details for these requirements only	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	Language in the Future-State Process Flows created by DFS PALM will be clear and understood by DBPR staff	Logged	04/18/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Staff continue to review PALM Business Processes. Related Risks are being mitigated.
People Processes Technology Data	Newly discovered CMS Wave remediation (if necessary) will be managed and conducted by DFS PALM outside of the DBPR PALM Readiness Project	Logged	11/06/24	DBPR Revenue staff Project Manager Finance & Accounting Bureau Chief DBPR Sponsor	Remediation of processes after the CMS wave were not necessary
People Processes Technology Data	Some Current-State Business Processes are not in PALM and thus will not have corresponding Future-State Business Processes to map to. Business Processes that fall into this category will still be reviewed for accuracy and tested where appropriate. Business Processes that have become obsolete and do not need to be tested will be flagged accordingly.	Logged	05/01/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief DBPR Sponsor	Processes continue to be identified and flagged that will not have a future state in PALM.
People Processes Technology Data	A Test environment will be made available to F&A staff so they can learn/confirm	Logged	06/12/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	The UAT environment availability is on hold until further notice from PALM.
People Processes	DFS PALM (The Project) will create base test scripts that illustrate navigation through the PALM system for UAT and DBPR staff will tweak as needed with specific department data and details	Logged	06/14/24	Project Manager Business Analyst	PALM has indicated recently that they will provide information for SMEs the Monday of each UAT Week.
People Processes	All PALM Future-State Business Processes will be able to be reviewed in some form or fashion (video, PALM TECH, and/or demonstration) well in advance of actual UAT testing	Logged	06/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	While screen mockups are available, it is more helpful to have videos or access to UAT so SMEs can see the information, or lack thereof, specific to DBPR.
People Processes	Data elements included in FLAIR standard reports will be provided by DBPR as well as will identify data elements included in DBPR custom reports	Logged	09/25/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief	PALM has provided sample reports to show the data elements. More information is expected as the data warehouse portion of PALM is developed.
People Processes Technology Data	All state-wide enterprise Business Systems will be remediated by their owners and are not the responsibility of DBPR; however, DBPR will be responsible for testing all systems.	Logged	06/21/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	The Versa interface is in progress
People Processes Data	DBPR will be responsible for providing traceability details and new requirements for business requirements that are unique to DBPR	Logged	07/17/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	No specific DBPR requirements have been identified at this time.
People Processes Technology Data	The Project Management Plan (PMP) will be reviewed quarterly (every 3 months) for accuracy and the appropriate updates will be applied so that the PMP does not become outdated and obsolete.	Logged	08/07/24	Project Manager Finance & Accounting Bureau Chief Project Sponsor	The Project Management Plan is updated only when there are scope changes. There have not been any scope changes after the most recent update.
Data	All PALM reports will include all Chart of Accounts fields (including OA2-Object Codes)	Logged	08/16/24	All DBPR division/office staff Project Manager Organizational Change Manager Accounting Systems Analyst	PALM Reports currently include OA2 codes, but will be reviewed regardless during Test Case reviews

				Finance & Accounting Bureau Chief Project Sponsor	
People Processes Technology Data	Taking advantage of available PALM interfaces will be available after PALM goes live	Logged	08/29/24	DBPR IT DBPR stakeholders	Spreadsheet Upload Interfaces are being adopted in DBPR/PALM processes where appropriate.
People Processes Technology Data	All needed PALM data can be obtained from PALM via queries and online screens as and when needed in an efficient and acceptable time frame.	Logged	09/25/24	All DBPR division/office staff Project Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Data will be available in reports, queries, the data warehouse, etc. Some date will be available via batch processing, and some batches are run on demand to move a PALM process forward. PALM provides Outbound Data Files for agency use too.
People Processes Technology Data	DBPR can resolve all technical hurdles and get Bank Deposit files out of Versa to FGCC without involving the DBPR Business staff	Logged	10/23/24	DBPR IT DBPR Revenue staff Project Manager	The Versa Interface is in progress
People Processes Technology	Review and familiarity with PALM Future-State Business Processes will be caught up and completed before UAT begins in August 2025.	Logged	11/27/24	All DBPR division/office staff Project Manager Organizational Change Manager	This is extending to at least 10/03/2025
People Processes Technology Data	DBPR Finance and Accounting staff can review the QLIK report generated out of Versa Regulation when they need to see Remittance Type (Deposit Type) details	Logged	12/04/24	DBPR Revenue staff	This will continue to be the case since customers are managed in Versa.
People Processes Technology Data	Multiple Future-State Crosswalks that are behind schedule can be done simultaneously and will be completed in accordance with the re-baselined Project Schedule	Logged	12/04/24	All DBPR division/office staff Project Manager Organizational Change Manager	Future State Crosswalks will be completed prior to Online UAT
People Processes Data	In addition to obtaining various scenarios and anomalies at Future-State Crosswalk sessions, details necessary to create/enhance all user stories will also be an objective out of the sessions	Logged	12/05/24	All DBPR division/office staff Project Manager Organizational Change Manager	Updates to user stories will be expected as well as updates to test cases.
People Processes Technology Data	All Enterprise Partners will provide the various scenarios for their respective Enterprise Business Systems that will be used to ensure the proper test scripts are created for UAT. Owners of enterprise business systems will provide the necessary test script details to perform business functions.	Logged	12/18/24	Project Manager Business Analyst	The scenarios will be tested during Online UAT and then updated to prepare for full UAT
People Processes Technology Data	All appropriate supplier data (including detail addresses) will be converted and available in PALM	Logged	01/08/25	All DBPR division/office staff	Addresses were provided.
People Processes Technology Data	Monthly review of the DBPR PALM Readiness Project Schedule with DBPR leadership will be scheduled and conducted and will provide the forum for sharing and discussing schedule details	Logged	02/12/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	We meet weekly now to discuss tasks and scheduled deliveries
People Processes Technology Data	All of the Change Analysis details will be completed in Smartsheet with enough time for a final review and update of technical details	Logged	01/07/25	Project Manager Organizational Change Manager Accounting Systems Analyst Finance & Accounting Bureau Chief Project Sponsor	Change Analysis details are reviewed regularly for any updates that are needed.
People Processes Technology Data	DBPR IT will complete the ABS modification for Versa Regulation (ABS) in time for all required testing	Logged	03/05/25	DBPR IT Project Manager	Questions from DBPR-IT are being researched for resolution
People	The new Business Analyst will be onboarded and available to attend PALM Training during the initial leg of UAT in August 2025.	Logged	03/19/25	Project Manager Business Analyst	The OCM manager is filling in as a BA.
People Processes Technology Data	Existing DBPR high-level Risks related to PALM education and training will continue to be mitigated/managed and any specific challenges related to training will be addressed as assumptions within the Training Plan rather than creating new individual Risks	Logged	04/02/25	Project Manager Organizational Change Manager	The OCM manager is reviewing the training plan for updates
People Processes Data	DBPR as well as the Project will follow PMI best practices and Rule 60GG statute.	Logged	05/28/25	IV&V endorses this.	The project follows PMI best practices and follows Rule 60GG.

DBPR Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
July - August 2025	Sally Huggins	sally.huggins@myfloridalicense.com	09/10/25
May - June 2025	Sally Huggins	sally.huggins@myfloridalicense.com	07/08/25
March - April 2025	Sally Huggins	sally.huggins@myfloridalicense.com	05/12/25
January - February 2025	Sally Huggins	sally.huggins@myfloridalicense.com	03/06/25